STEELE Mutual Fund Expert *Quick Start*

CD Installation Instructions

1. Insert the CD into your CD-ROM drive.
2. If Windows does not begin the installation automatically:
   - Click the **Start** button on the task bar
   - Choose **Control Panel**
   - Double-click on **Add**/**Remove Programs**
   - Click the **Install** button
3. Follow the installation instructions on the screen.

To order
go to www.MutualFundExpert.com

For support e-mail to:
Support@MutualFundExpert.com
or call (310) 281-5533 9am-5pm PT M-F

Useful Functions

- **Rank Columns to find the best funds**
  1. Double-click on the column header of the column you wish to rank. The Expert will sort the column and a green arrow will appear in the header indicating whether the column is sorted in ascending or descending order.
  2. A single green arrow indicates a primary rank.
  3. To rank more than one column at a time, hold down the Ctrl key and double-click on the column header of the column you wish to rank. The Expert will sort the column and two green arrows will appear. You can sort up to 5 columns at one time.

- **View the definition of a database column**
  When viewing the database, to see a definition of a data column, (e.g., *Standard Deviation*), click anywhere in that column and then press **F1**. The definition for that column will pop up. Pressing **F1** always invokes the context-sensitive Mutual Fund Expert Help.

- **Find a specific fund in the Database view**
  1. Simply click in the “Find” text box above the column headers and start typing the name of the fund. As you type, the Expert will instantly put the fund name matching what you are typing on the screen and highlight it. Then, click on any Detail Report.
  2. To search by symbol select “**Symbol**” from the “Find” drop-down list.
  3. *Alternatively*, for more flexible searches you can use the full Find command by clicking on the toolbar button with the magnifying glass or by pressing **Ctrl-F**. The “Find” dialog box will appear where you can customize your search and click on the “Find” button. The Expert searches for the first instance of the value you entered and the fund appears highlighted on-screen.

- **Customize Full-Page Reports**
  You have the power and flexibility to change any report to look exactly the way you like. Click the ‘Design Mode’ button on the toolbar to put the Report into design mode. Now click any object on the report and you will see small “grippers” appear around the object. You can use them to move or resize the objects with the mouse. Any text, table or graph on a report can be moved, resized or deleted. Double-click on any object to change its properties.

- **Tag (Select) Multiple Funds**
  1. Click on the record number of each fund you want to tag. A red triangle mark will appear.
  2. To tag multiple funds in a row, click on the record number and continue to hold the mouse button down until you have tagged the block of funds you want.

- **Create a "Portfolio Fund" record in the database to track and compare your portfolio**
  1. Select the funds that you wish to include in a Portfolio. If you are in a Database view, the fund that is currently selected or the tagged funds will be included. If you are viewing a Report or Graph page, the funds displayed will be included.
  2. From the menu select ‘Portfolio’ then ‘New’. When the "Enter the Name for This Portfolio" dialog box appears, enter a unique name for the Portfolio.
  3. Select OK. The Portfolio window appears on-screen and the Portfolio fund is added to the database. An asterisk (*) is added to its name to distinguish it from regular funds and indexes. You can now include your Portfolio in any report for comparison.

  The Portfolio Fund will be inserted on the Page you are currently viewing: a Report, Graph, or Database View. If your Database View is sorted by the Name field, then any Portfolio Funds will be listed first. When values are entered in the Portfolio window, the Expert will calculate the data for the Portfolio Fund.

- **Create a Securities Group of Tagged Funds (handy for funds that you view on a regular basis)**
  1. In Database view, tag the funds that you wish to include in the Securities Group.
  2. From the main menu select ‘Database’ then ‘Save Tagged Records to Securities Group’. The “Enter a Name for This Securities Group” dialog box appears.
  3. Enter a unique name for the Securities Group and select OK. Your Securities Group is now saved and can be retrieved for future use.

*For help with other technical issues, please see the Online User’s Guide, found in the Help menu of the Expert program or refer to the “Questions” section of our site at **www.MutualFundExpert.com**.*
For support send e-mail to Support@MutualFundExpert.com or contact us at (310) 281-5533 9am-5pm PT Monday - Friday.

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